



DRAFT Grantee Training Manual

Grants Online Overview System Navigation Grantee Actions

Prepared by BearingPoint, Inc.

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Document Conventions

Overview Welcome to the Grants Online Training Manual. This manual is set up to provide you with step-by-step information to accomplish tasks within Grants Online. The manual is logically sequenced based on the National Oceanic and Atmospheric Administration's (NOAA) Grants lifecycle process and is written to address your role within Grants Online.

Using this Guide Use the following writing conventions as a guide in using the manual. The manual uses block label text in order to scan for the information desired.

Text Conventions

Text; Example

Text in Bold; Click **Done**

Text in Italics; *RFA Details* screen appears.

Text in Bold Italics; ***Name***

What it means.

Indicates a command.

Indicates a screen.

Indicates data to be entered into a field.

Notes and Warnings

Notes and Warnings are used to indicate additional information or advisories when using Grants Online.



Note: A note is used to inform you about additional information during the procedure or process.



Warning!

Business process may not work as desired or a procedure may produce an undesirable effect.

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Grants Online Overview

Overview The National Oceanic and Atmospheric Administration (NOAA) offers a variety of competitive and non-competitive grants (or awards) to various communities including States, Universities, and non-profit organizations. Prior to the advent of Grants Online, the processing of grants was a paper-based task involving time-consuming human interactions and program policies to process the grants and to ensure the awarding of the grant is given to the most qualified applicant for a competitive award, and for qualified designated applicants of non-competitive awards.

As part of its strategy to move scientifically and operationally into the 21st century, Grants Online was developed. Grants Online is an E-Government initiative to create an automated tool that will support the grant evaluation, award, management and operations process. Grants Online significantly streamlines and unifies grants processing throughout all of NOAA, allowing the agency to increase efficiencies related to mission goals.

Grants Online has been developed to respond to several needs that occur during award processing including:

- Reducing or eliminating paper forms for application.
- Providing an interface with Grants.gov to ensure applicants can apply for grants electronically.
- Reducing the processing time by incorporating workflows between Federal Program Officers (FPO), Grants Management Division (GMD), Financial Assistance Legal Division (FALD), and Reviewers.
- Serving the NOAA community in its efforts to meet its mission goals more effectively.

Grants Online Software Description

About Grants Online Grants Online operates in a web environment. As such, you will be required to use an internet browser to log in and use Grants Online. No software is required for installation. As Grants Online is web-based, you may access the system anywhere at anytime provided that you have internet access. Logins and passwords are required and will be relayed to you once you are established within the system.



Note: You must have an Internet connection in order to access Grants Online.

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Getting Started

Overview When you are using any Windows-based software, navigation and ease of use are key components. Grants Online incorporates an intuitive Graphic User Interface (GUI) that assists end users to navigate and use the system appropriately. In Grants Online, all actions within the system can be made through mouse and keyboard. In this module, you will be shown the basics of Grants Online, including the look and feel of the system, navigation, and user customizations.

Module Objectives In Module 1: you will accomplish the following objectives:

- Obtaining your password
- Logging into the system
- Identifying Grants Online screen features
- Managing your Inbox
- Updating your profile

Overview Grants Online is accessible through your web browser. It works best with Internet Explorer.

Accessing Grants Online

1. Click on the Internet Explorer Icon on your desktop
 - Internet Explorer browser opens
2. Enter the following URL information in your address bar of your browser:

<https://pegasus.rdc.noaa.gov:7002>

then press **ENTER**

- *Grants Online Login* page appears

Logging in to Grants Online

1. If you need help with your userid and/or password during the pilot, contact the Grants Online Pilot Help Desk for assistance.
 - Phone: 301-713-0105 x204
 - Email: GrantsOnline.QandA@noaa.gov
2. Enter your assigned **Username**
3. Enter your assigned **Password**
4. Click **Enter**



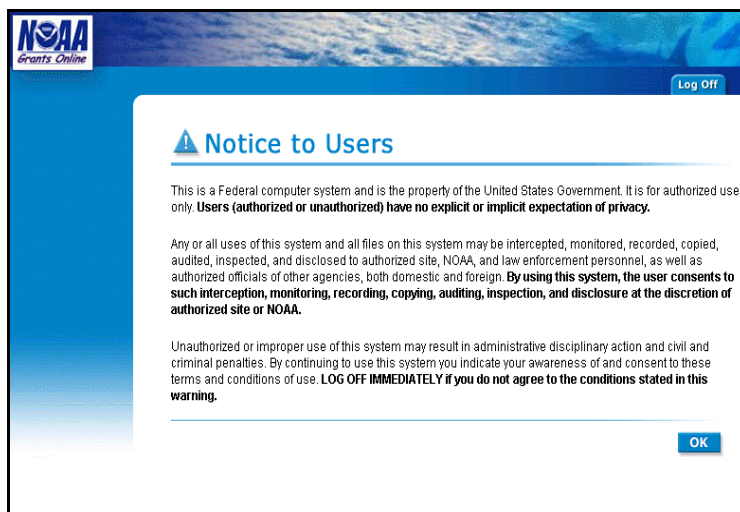
Warning!

If you entered your username or password incorrectly you will see an error message in red on the screen. After three unsuccessful attempts to log in, the system will lock you out and you will have to contact the Grants Online Pilot Help Desk to unlock your account

If nothing happens when you click enter, it means the server is down and will need to be restarted.

Logging in to Grants Online

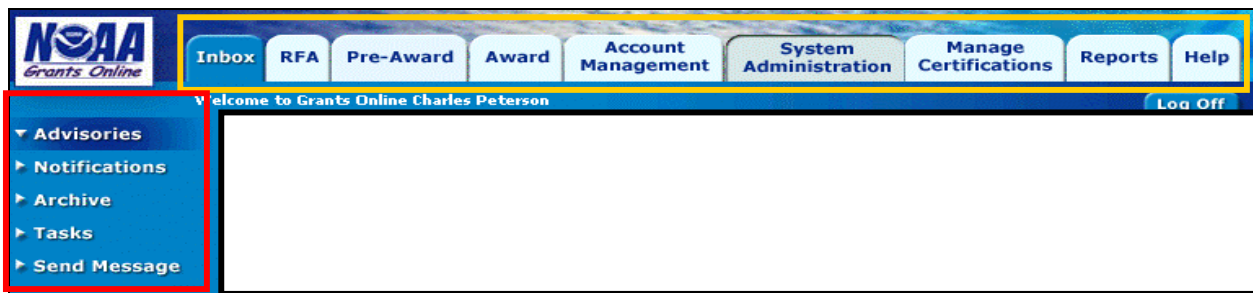
5. The Notice to Users screen appears
6. Review disclaimer information and click **OK**



Grants Online Navigation Features

Overview Navigating Grants Online is a simple process. The look and feel of the system requires the use of a mouse and keyboard for navigation. Access to certain features of Grants Online is based on your user role. Your user role determines the required access for you to do your work in Grants Online.

Screen Layout



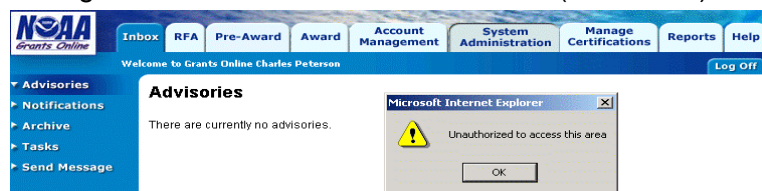
Screen Layout Defined

Once you have successfully logged into Grants Online, the system will default you to the Inbox tab. Grants Online is actually broken into several areas (refer to illustration above):

- **Tabs:** Located at the top of the page and highlighted by the gold border are Grants Online Tabs. Use the Tabs to navigate within the different areas of Grants Online. Click on the appropriate Tab to navigate to the desired area.



Note: Access to various Tabs is determined by your user role. A grayed out Tab will denote restricted areas. If trying to access a restricted area, a pop up message will display, stating "Unauthorized to access this area" (see below).



- **Navigation Pane:** Highlighted by the red border is the navigation pane. Based on the Tab that you are currently on, commands for certain functions display here. Click on the desired command to go to that specific screen.
- **Document Pane:** Highlighted by the black border is the document pane. It is located in the middle of the screen. This is where most of the data in Grants Online will be displayed or input.

Managing Your Inbox

Managing your Inbox is a straightforward task. From your Inbox you can access and view information related to: System Advisories, Notifications and Tasks. You may also send an email to a group or to an individual.

Advisories Upon successfully logging into the system, you will be taken by default to the Advisories page within the Inbox Tab. In figure 3, you can view any advisories noted in the system. These are created by the system administrator and cannot be edited.

The screenshot shows the NOAA Grants Online interface. The top navigation bar includes tabs for Inbox, RFA, Pre-Award, Award, Account Management, System Administration, Manage Certifications, Reports, and Help. A welcome message reads "Welcome to Grants Online Mark La Fave" with a "Log Off" button. The left sidebar contains a list of links: Advisories, Notifications, Archive, Tasks, and Send Message. The main content area is titled "Advisories" and displays a table with the following data:

Advisory Date	Advisory
10/17/2004 03:44 PM	Test new advisory

A yellow callout box with the text "Click on the links above to view Notifications, Archived notifications, Tasks, or to Send a Message" is overlaid on the sidebar links.

Accessing Notifications

1. From the Inbox Tab, click **Notifications**
 - *Notifications* screen appears



Notification ID	Recipient Name	Sender Name	Subject	Created Date
<input type="checkbox"/> 737202	Solomon King	Mark La Fave	Procurement Request 103131 for Award File 103130	2005-04-05 18:28:01.0
<input type="checkbox"/> 724053	Solomon King	Solomon King	Reminder	2005-03-29 15:14:01.0
<input type="checkbox"/> 724013	Solomon King	Solomon King	Reminder	2005-03-29 15:10:54.0
<input type="checkbox"/> 723973	Solomon King	Solomon King	Reminder	2005-03-29 15:07:59.0
<input type="checkbox"/> 723933	Solomon King	Solomon King	Reminder	2005-03-29 15:04:59.0
<input type="checkbox"/> 723893	Solomon King	Solomon King	Reminder	2005-03-29 15:01:52.0
<input type="checkbox"/> 723853	Solomon King	Solomon King	Reminder	2005-03-29 14:58:53.0
<input type="checkbox"/> 723813	Solomon King	Solomon King	Reminder	2005-03-29 14:55:52.0
<input type="checkbox"/> 723773	Solomon King	Solomon King	Reminder	2005-03-29 14:52:53.0
<input type="checkbox"/> 723736	Solomon King	Solomon King	Reminder	2005-03-29 14:49:52.0

Notifications Notifications are displayed in your Inbox to update you about work in the. There are different types of notifications, which let you know:

1. You have a task to perform
2. An action has been taken on one of your documents.

Other types of notifications include information related to: direct assignments, status within the workflow process, and overdue tasks. You can archive your notifications or delete them by checking the box and clicking on the blue Archive or Delete button.



Note: You can modify the notifications that appear in your Inbox through the Account Management Tab. Archived notifications appear in your Archive folder, accessible by clicking on the Archive link.

Archiving and Deleting Notifications

1. Click the check box next to the notification you wish to archive or delete
2. Click the blue **Archive** button or the blue **Delete** button
 - The task is moved to the *Archives* folder or is permanently deleted



Note: You can delete or archive an entire page of your notifications at once by checking the box in the header column (seen below)

<input checked="" type="checkbox"/>	Notification ID	Recipient Name	Sender Name	Subject	Created Date
-------------------------------------	-----------------	----------------	-------------	---------	--------------



Warning!

Once a notification is deleted, it cannot be recovered.

Viewing Notifications

1. Click on the **ID number** next to the notification you wish to view
 - *Notification Details* screen appears
2. Click **Ok** to close the task and return to the *Notifications* screen

Archived Notifications

Archived Notifications is your personal repository for all notifications you would like to maintain for historical purposes.

Accessing Archived Notifications

1. From the Inbox Tab, click **Archive**
 - Archive screen appears

10 items found, displaying all items. 1

<input type="checkbox"/>	Notification ID	Recipient Name	Sender Name	Subject	Created Date
<input type="checkbox"/>	513670	Solomon King	Solomon King	Reminder	2005-03-09 15:57:23.0
<input type="checkbox"/>	513636	Solomon King	Solomon King	Reminder	2005-03-09 15:54:24.0
<input type="checkbox"/>	513629	Solomon King	Solomon King	Reminder	2005-03-09 15:54:24.0
<input type="checkbox"/>	513595	Solomon King	Solomon King	Reminder	2005-03-09 15:51:25.0
<input type="checkbox"/>	513588	Solomon King	Solomon King	Reminder	2005-03-09 15:51:24.0
<input type="checkbox"/>	513552	Solomon King	Solomon King	Reminder	2005-03-09 15:48:25.0
<input type="checkbox"/>	513545	Solomon King	Solomon King	Reminder	2005-03-09 15:48:24.0
<input type="checkbox"/>	513511	Solomon King	Solomon King	Reminder	2005-03-09 15:45:28.0
<input type="checkbox"/>	513504	Solomon King	Solomon King	Reminder	2005-03-09 15:45:26.0
<input type="checkbox"/>	513470	Solomon King	Solomon King	Reminder	2005-03-09 15:42:45.0

[Delete](#)

Deleting Archived Notifications

1. Select the notification you wish to delete by clicking in the check box next to that action
2. Click the **Delete** button
 - The task will be removed from *Archived Notifications*



Warning!

Once a notification is deleted, it cannot be recovered

Viewing Archived Notifications

1. Click **View** next to the notification you wish to view
 - Notification Details screen appears
2. Click **Ok** to close the notification and return to the *Notifications* screen

Tasks

While Notifications alert you to an action you must complete, Tasks allow you to complete that action assigned to you within the workflow. Tasks that are assigned to you can be located in the Task section in the Inbox Tab.

Accessing Tasks

- From the Inbox Tab, click **Tasks**
 - Inbox Tasks* screen appears

Welcome to Grants Online Bala Krishna

Inbox Tasks

Document Type: Status: [Apply Filter >>](#)

31 items found, displaying all items.1

View	Task ID	Task Name	Task Status	Document Type	Document ID	Start Date	Completed Date	Award Number
View	47353	Accept/Decline Award	Not Started	Award Package	104403			NA05NMF4331229
View	46756	Review Award File	Not Started	Award File	104373			NA05NMF4331221
View	46482	Review Amendment	Not Started	Amendment	104344			NA05NMF4331221
View	45382	Review Award File	Not Started	Award File	104182			NA05NMF4441211
View	45367	Review Amendment	Not Started	Amendment	104180			NA05NMF4441211
View	44532	Accept/Decline Award	Not Started	Award Package	104066			NA05NMF4331203
View	44255	Manage Award Users	Not Started	Award Package	104040			NA05NMF4331201



Note: Customizing the Tasks view may be accomplished through the Account Management Tab.

Viewing a Task

- Click **View** next to the task you wish to view
 - Launch Page* appears. From this page you may perform your assigned work by selecting an action in the action dropdown.

Filtering Tasks

- Select the **Document Type** in the drop-down menu
- Select the **Status** in the drop-down menu
- Click **Apply Filter**
 - Tasks** screen appears

Document Type: Status: [Apply Filter >>](#)

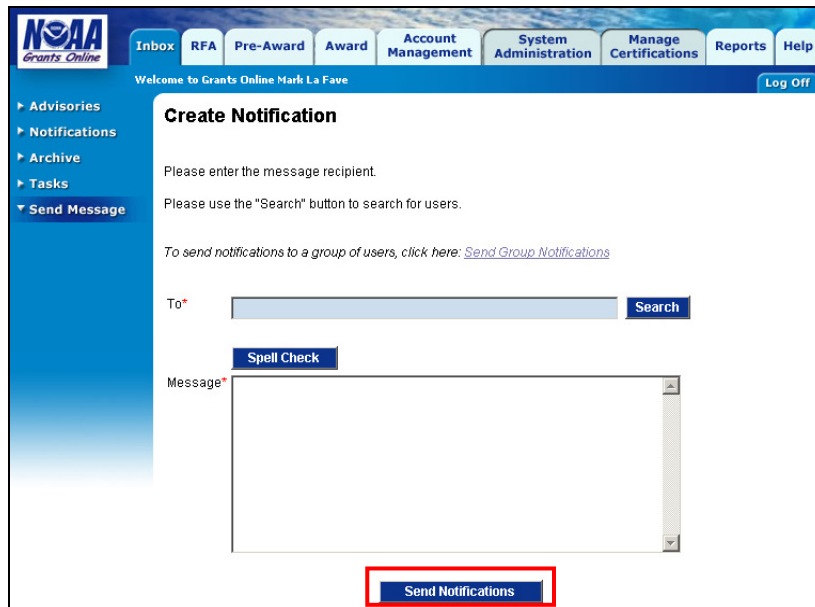
Send Message

Notifications can be created to send to an email to the address indicated in the user's profile.

Accessing Send Message

From the Inbox Tab, click **Send Message**

- *Send Message* screen appears



Sending Individual Notifications

1. Select **Search** in the "To" field
2. Select the individual to whom you wish to send a notification
3. Type the body of the notification in the MESSAGE box
4. Click **Spell Check** to check your spelling
5. Click **Send Notifications** once the message has been completed

Managing Your Profile

The Account Management Tab allows you to view your Profile, Preferences and Delegations. Within this tab you can update your profile, customize your Notifications and Tasks preferences, and delegate your inbox to other users.

Account Management

[- MY PROFILE -](#)

This option allows you to view and update your personal profile. You may update your name and address information, as well as your security question and answer. You may also view your system profile attributes, including your username and your currently assigned roles.

[- MY PREFERENCES -](#)

This option allows you to view and update your current system preferences. These preferences include your system password, the columns you would like to have displayed on your Inbox view, and your notification and email preferences.

[- MY DELEGATIONS -](#)

This option allows you to view and update the users to whom you have delegated your work. You may search for users that have similar permissions as you and choose to delegate your work to them. The users will then receive an email and/or notification, and they will be able to log in and perform all of your tasks and activities.

Accessing My Profile

- From the Account Management Tab, click **My Profile**
 - My Profile** screen appears

Manage Profile [Edit >>](#)

Prefix: Dr.
 First Name: Mark
 Middle Name:
 Last Name: La Fave
 Affix:

User Account Details
 User Name: mlafave_fpo
 Security Question: mlafave_fpo
 Security Answer: mlafave_fpo
 Active Flag: true

Reviewer Details
 Is Accepting Reviews?: true
 Unavailable From: None To: None
 Skills: air, sea, fish

Affiliations

Details	Organization	Position	Phone	Address	E-Mail	Fax	Primary	Active
Details	Fisheries		(703)555-1212	123 University Ave, Chicago, IL 94867 USA	mark.lafave@noaa.gov		true	true

Assigned Roles

Role	Organization
Budget Officer	Fisheries
FALD	FALD
Federal Program Officer - Certified	Fisheries



Note: To change roles and affiliations, contact the Help Desk

Editing Your Profile

1. Click **Edit** (once you click edit, the screen will become formatted like the one below)
2. Make the necessary changes
3. Click **Save** to capture your changes
4. Click **Save and Return to Main** to return to the Account Management tab main screen
5. Click **Cancel** to go back to the previous screen (any changes you made will NOT be saved)

NOAA Grants Online

Inbox RFA Pre-Award Award Account Management System Administration Manage Certifications Reports Help

Welcome to Grants Online Solomon King [Log Off](#)

My Profile
My Preferences
My Delegations

Manage Profile

Prefix:

First Name: *

Middle Name:

Last Name: *

Affix:

User Account Details

User Name: sking

Security Question: *

Security Answer: *

Active Flag: true

Affiliations

Details	Organization	Position	Phone	Address
Details	SOUTH EAST REGIONAL OFFICE - NMFS		(111)111-1111	1315 East-West Highway, Silver Spring, MD 20910 USA

[Add a new affiliation >>](#)

Assigned Roles

Role	Organization
Federal Program Officer - Certified	NORTH EAST REGIONAL OFFICE - NMFS
Federal Program Officer - Certified	SOUTH EAST REGIONAL OFFICE - NMFS

Save **Save and Return To Main** **Cancel**

Security Question and Security Answer are areas used by the Help Desk team. If you call the Help Desk to request to reset your password, support specialist will ask you this personalized question and you will provide the answer as a means of authenticating the caller.

My Preferences

Customize your viewing preferences through the *My Preferences* screen. You may add/remove email Inbox notifications. This will remove notifications sent to your external email account only. Headings may be customized to display certain fields on your Tasks and Notifications screens. Additionally, you may change your password for Grants Online.

Accessing My Preferences

1. From the Account Management Tab, click **My Preferences**
 - *My Preferences* screen appears

	Grants Online Inbox	Email Inbox
System Generated Advisories		
Password Expiration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Scheduled Downtime	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Policy Update	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
System Generated Workflow		
Task Assignment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Item Submission	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delegation of Work	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
System Generated Notices		
Expired Certification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Pending Due Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Overdue Item	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Customizing Notifications and Tasks Headers

1. Select desired Notification and/or Task columns to enable/disable
2. Click box to enable or disable to the right of the Task Column Label
3. Click **Save**

Task Preferences

	Displayed
General Tasks	
Task Id	<input checked="" type="checkbox"/>
Task Name	<input checked="" type="checkbox"/>
Task Status	<input checked="" type="checkbox"/>
Document Type	<input checked="" type="checkbox"/>
Document Id	<input checked="" type="checkbox"/>
Start Date	<input checked="" type="checkbox"/>
Completed Date	<input checked="" type="checkbox"/>
Award Number	<input checked="" type="checkbox"/>
RFA Tasks	
Task Id	<input checked="" type="checkbox"/>
Task Name	<input checked="" type="checkbox"/>
Task Status	<input checked="" type="checkbox"/>
Document Type	<input checked="" type="checkbox"/>
Document Id	<input checked="" type="checkbox"/>
Start Date	<input checked="" type="checkbox"/>
Award Tasks	
Task Id	<input checked="" type="checkbox"/>
Task Name	<input checked="" type="checkbox"/>
Award Number	<input checked="" type="checkbox"/>
Status	<input checked="" type="checkbox"/>
Document Id	<input checked="" type="checkbox"/>
Document Type	<input checked="" type="checkbox"/>
Start Date	<input checked="" type="checkbox"/>
Completed Date	<input checked="" type="checkbox"/>
PostAward Tasks	
Task Id	<input checked="" type="checkbox"/>
Task Name	<input checked="" type="checkbox"/>
Award Number	<input checked="" type="checkbox"/>
Task Status	<input checked="" type="checkbox"/>
Document Id	<input checked="" type="checkbox"/>
Document Type	<input checked="" type="checkbox"/>
Start Date	<input checked="" type="checkbox"/>
Completed Date	<input checked="" type="checkbox"/>

Save

Changing Your Password

1. Click **Change Password** in the *User Preferences* screen



- *Change Password* screen appears

2. Enter old password (see picture below)
3. Enter new password (see picture below)
4. Enter new password again to confirm (see picture below)
5. Click **Submit**

 A screenshot of the NOAA Grants Online 'Change Password' screen. The top navigation bar is the same as the previous screenshot. The left sidebar shows 'My Profile', 'My Preferences' (selected), and 'My Delegations'. The main content area is titled 'Change Password'. It contains three input fields: 'Old Password :*', 'New Password :*', and 'Confirm New Password :*'. To the right of these fields are 'Password Guidelines :'. Below the input fields are two buttons: 'Submit' and 'Cancel'. The 'Submit' button is highlighted with a red rectangular box.

Old Password :*

New Password :*

Confirm New Password :*

Submit Cancel

Password Guidelines :

- Passwords must contain at least eight(8) non-blank characters.
- Passwords cannot contain quotation marks.
- Passwords are not case sensitive.
- A Password must begin with an alphabetic character.
- At least one of the characters must be a number(0-9) or a special character(_,\$,#).
- Six of the characters may only occur once in the password.



Note: Please follow the indicated Password Guidelines. Also, note that the special characters listed are the **ONLY** ones that are valid (_,\$,#)

My Delegations

When you select the My Delegations link in the Account Management Tab, you will be able to view existing delegates, add delegates and rescind delegates. The only people you can select to be a delegate are those that have roles matching yours. Example – an Authorized Representative cannot create a delegation to an individual who only has the role of Recipient Investigator.

Accessing My Delegations

1. From the Account Management Tab, click **My Delegations**
 - *Delegate Authority* screen appears

The screenshot shows the NOAA Grants Online interface. The top navigation bar includes links for Inbox, RFA, Pre-Award, Award, Account Management (selected), System Administration, Manage Certifications, Reports, and Help. A 'Log Off' button is also present. The left sidebar shows 'My Profile', 'My Preferences', and 'My Delegations' (selected). The main content area is titled 'Delegate Authority' and states 'You currently have no peers on your list of delegates'. Below this is a 'Search for Peers' section with a note: 'Please note that this search will only cover those users who match the criteria and have at least the same permissions as you do.' The search fields are: First Name, Last Name, Organization, and Role (a dropdown menu with options: AGO, Awardee, Budget Officer, CAMS Finance Representative). A 'Find Peers' button is at the bottom of the search section.

Adding a Delegation

1. Search by First Name, Last Name, Organization or Role
2. Click **Find Peers**
3. Select delegations
4. Click **Delegate**

This screenshot shows the 'Delegate Authority' screen after a search. The search fields are filled with: First Name: charles, Last Name: (empty), Organization: (empty), and Role: (dropdown menu). The 'Find Peers' button is visible. Below the search fields, the 'Search Results' section displays a single result: 'Peterson Charles'. At the bottom of the result, there are two buttons: 'Delegate' and 'Share'. Red arrows from the numbered list point to the 'Find Peers' button, the search results, and the 'Delegate' button. A red box highlights the 'Delegate' button.

Rescinding a Delegation

1. From the Account Management Tab, click **My Delegations**
 - *My Delegations* screen appears
2. Click on **Rescind** to remove the individual as your delegate

NOAA Grants Online

Welcome to Grants Online Solomon King [Log Off](#)

Delegate Authority

Current Peers on delegation List:

Action	Prefix	Affix	Name	Phone	Email	Fax	Title	Organization
Rescind	Mr.		Charles Peterson	301-713-0105	charles.peterson@noaa.gov			SOUTH EAST

Search for Peers
Please note that this search will only cover those users who match the criteria and have at least the same permissions as you do.

First Name:

Last Name:

Organization:

Role:
AG0
Awardee
Budget Officer
CAMS Finance Representative

[Find Peers](#)

Logging in as a Delegate

1. Log in to Grants Online with your normal user name
2. Click **OK** on the *Notice to Users* page
3. Choose to either continue in as yourself (**Continue to Inbox**) or to go in as the person who delegated to you (**Select** – by the person's name)



Warning!

It can take up to three minutes for the system to process your request to go in as a delegate .

Select	User Name
Select	Solomon King

[Continue to Inbox](#)



Note: When you are in Grants Online as a delegate, the system will identify you as a delegate of that individual (see below). ** Both you and the delegate can work in Grants Online simultaneously.

OPERATING AS DELEGATE FOR SOLOMON KING

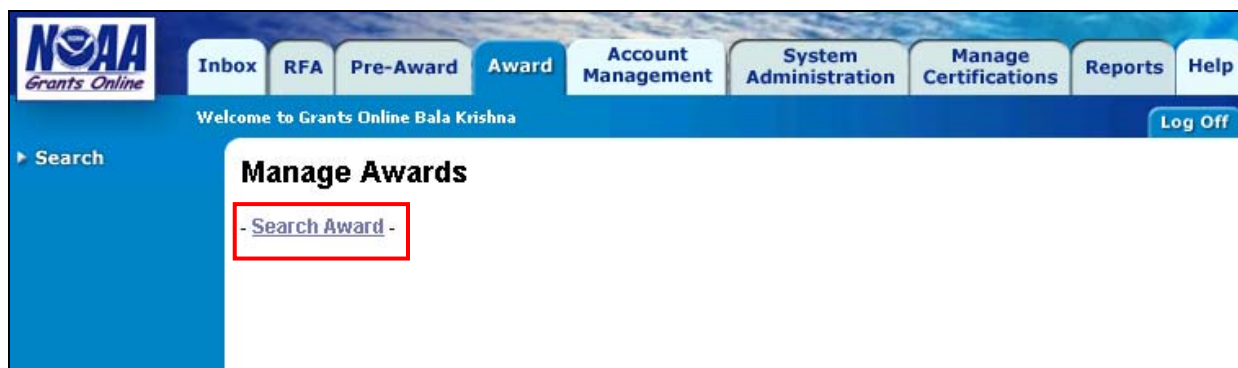
Working In Grants Online

How to Search For Your Award

This section will provide you with a step-by-step process on how to search for an award in Grants Online

Award Search

1. Once you have logged in to Grants Online, click on the Award tab
2. Click on the **Search** option to search for an Award



3. Enter search criteria into at least one of the query fields listed
4. Click **Submit** (the "Nothing found to display" message displays until you click the submit button)

A screenshot of the NOAA Grants Online 'Search for Award' page. The top navigation bar is the same as the previous image. The 'Search' link in the left sidebar is highlighted. The main content area is titled 'Search for Award'. It contains two input fields: 'Applicant Name' and 'Award Number' (which has the value '4331229'). Below these fields are 'Submit' and 'Cancel' buttons. The 'Submit' button is highlighted with a red box. To the right of the search fields is a yellow box titled 'Examples of good search criteria:' containing two bullet points: 'Partial searches (entering the last 7 digits of the award will pull up all awards with those numbers)' and 'Wildcards can be used.' with a sub-bullet 'o % will yield results that have zero or more characters in between characters you entered as part of the search query'. Below the search fields, the text 'Search Results' and 'Nothing found to display.' is visible.

Award Search

5. The results from your search will display under the *Search Results* header
6. Select the Award you want to view by clicking the award number link

NOAA Grants Online

Inbox RFA Pre-Award **Award** Account Management System Administration Manage Certifications Reports Help

Welcome to Grants Online Bala Krishna [Log Off](#)

► Search

Search for Award

Applicant Name :

Award Number :

[Submit](#) [Cancel](#)

Search Results

One item found.1

Award Number	Applicant Name	Award Status	Award Action Request	Manage Recipient
NAO5NMF4331229	University of Chicago	Pending	N/A	Manage Recipient

Award Search

7. The Award Header page (Grants File) now displays
8. If you wish to view the history of this RFA click the **view previous workflow history and comments>>** link
9. If you wish to view one of the Sub Documents, click on the link next to the document you want to view

Grants File - NA05NMF4331229

Id: 104398
Creator: SYSTEM ACCOUNT **Create Date:** 06/02/2005
Status: Grants File Creation In Progress **Status Date:** 06/02/2005
Last Edited User: SYSTEM ACCOUNT

This document currently has no tasks assigned to you. However, you may [view previous workflow history and comments >>](#)

Grant Information

CFDA Number: 11.433 **Award Period:** 07/01/2005 - 12/31/2005 **Program Office:** NORTH EAST
Program Officer: Charles Peterson **Program Officer Phone:** 301-713-0105 **Program Officer Email:** charles.peters
Total Federal Funding: \$100.00 **Total Non Federal Funding:** \$0.00
Organization Name: University of Chicago
Project Title: Testing for CCB folder changes

Sub Documents

3 items found, displaying all items.1

Type	ID	Title	Creator	Create Date	Last Action User	Status	Status Date
Award Package	104403	Testing for CCB folder changes	SYSTEM ACCOUNT	06/02/2005	SYSTEM ACCOUNT	AOActions Not Started	06/02/2005
Award File 0	104399		SYSTEM ACCOUNT	06/02/2005	SYSTEM ACCOUNT	GrantsOfficerActions Complete	06/02/2005
Award File In Progress	104407		Charles Peterson	06/03/2005	Charles Peterson	IN Progress	06/03/2005

Associated Documents

Nothing found to display.

Additional Documents

Nothing found to display.

Associated Attachments

Nothing found to display.

[Edit Attachments](#)

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Accept or Decline an Award

This section will provide you with a step-by-step process on how to work on your first task in Grants Online – Accepting or Declining your award.

Accepting an Award

1. Once you have logged in to Grants Online, click on the Task link to view your tasks



Accepting an Award

1. Click View next to the task to Accept/Decline Award

NOAA Grants Online

Welcome to Grants Online Bala Krishna

Inbox Tasks

Document Type: Status: [Apply Filter >>](#)

31 items found, displaying all items.1

View	Task Id	Task Name	Task Status	Document Type	Document Id	Start Date	Completed Date	Award Number
View	47363	Accept/Decline Award	Not Started	Award Package	104403			NA05NMF4331229
View	46756	Review Award File	Not Started	Award File	104373			NA05NMF4331221
View	46482	Review Amendment	Not Started	Amendment	104344			NA05NMF4331221
View	45382	Review Award File	Not Started	Award File	104182			NA05NMF4441211
View	45367	Review Amendment	Not Started	Amendment	104180			NA05NMF4441211
View	44532	Accept/Decline Award	Not Started	Award Package	104066			NA05NMF4331203
View	44255	Manage Award Users	Not Started	Award Package	104040			NA05NMF4331201

2. **Task Screen** appears
3. Select an option from the action dropdown and click submit
 - Accept Award – Recipient accepts terms and conditions of award
 - Decline Award – Recipient rejects terms and conditions of award and will not receive funding (You will need to provide an explanation)
 - Return to NOAA for Revisions – Recipient would like to request changes to award
 - View Award Details – Recipient wants to view terms and conditions of award

NOAA Grants Online

Welcome to Grants Online Bala Krishna

Award Package - NA05NMF4331229

Id: 104403
 Creator: SYSTEM ACCOUNT
 Status: Award Package Accept/Decline Award Not Started
 Last Edited User: SYSTEM ACCOUNT
 Create Date: 06/02/2005
 Status Date: 06/02/2005

Action: [Submit](#)

Comment:
 Accept Award
 Decline Award
 Return to NOAA for Revisions
 View Award Details

[Spell Check](#)

[Save Comment](#)

[View previous workflow history and comments >>](#)

Accepting an Award

4. Details Screen appears
5. Review information
6. Click on **CD450 Report** to view a PDF version of the Award document
7. Click on **SAC Report** to view a PDF version of the Special Awards and Conditions
8. Click **Cancel** to go back to your task

THIS DOCUMENT IS LOCKED

Financial Assistance Award

The system has calculated values for the Federal and Non-Federal shares of funding based on existing CD-435s and negotiated funding amounts. Grants Online users may optionally Override these calculations via the Override checkbox below. Once checked, the values that are entered will be saved and available on the CD-450 report. Please note that when the Grants Officer signs, the system will automatically Override and store the currently populated funding fields.

Recipient Name:	University of Chicago			Federal Share of Cost:	<div>\$100.00</div>	Override <input checked="" type="checkbox"/>
Street Address:	Main Street			Recipient Share of Cost:	<div>\$0.00</div>	
City, State, Zip:	CHICAGO , IL 60601	Project Title:	Testing for CCB folder changes	Total Estimated Cost:	<div>\$100.00</div>	
CFDA Number:	11.433	Award Number:	NA05NMF4331229	Award Period:	07/01/2005 - 12/31/2005	

CD-450 Items

<input type="checkbox"/> Department Of Commerce Financial Assistance Standard Terms and Conditions	Required
<input checked="" type="checkbox"/> NOAA Special Award Conditions	Required
<input checked="" type="checkbox"/> Line Item Budget (Attach File)	Required
<input checked="" type="checkbox"/> 15 CFR Part 14, Uniform Administrative Requirements for Grants and Agreements with Institutions of Higher Education, Hospitals, Other Nonprofit, and Commercial Organizations	
<input checked="" type="checkbox"/> 15 CFR Part 24, Uniform Administrative Requirements for Grants and Agreements to State and Local Governments	Required
<input type="checkbox"/> OMB Circular A-21, Cost Principles for Educational Institutions	
<input checked="" type="checkbox"/> OMB Circular A-87, Cost Principles for State, Local, and Indian Tribal Governments	Required
<input type="checkbox"/> OMB Circular A-122, Cost Principles for Nonprofit Organizations	
<input checked="" type="checkbox"/> 48 CFR Part 31, Contract Cost Principles and Procedures	
<input checked="" type="checkbox"/> OMB Circular A-133, Audits of States, Local Governments, and Nonprofit Organizations	Required
<input type="checkbox"/> Other(s)	Required

There are no attachments on this Grants File

Grants Officer: Arlene Porter

Signature Date: 06/02/2005

This award approved by the NOAA Grants Officer constitutes an obligation of Federal funding. By electronically signing, the Recipient agrees to comply with the Award provisions checked on this document, as well as provisions incorporated into the Award. If not electronically signed without modification by the Recipient within 30 days of receipt, the Grant Officer may unilaterally terminate this Award.

Cancel **CD450 Report** **SAC Report**

Accepting an Award

9. Select an Action and click **Submit**
10. To view a document under the Sub Documents, Associated Documents, or Additional Documents section click on the link next to the document you wish to view

Award Package - NA05NMF4331229
Id: 104403
Creator: SYSTEM ACCOUNT **Create Date:** 06/02/2005
Status: Award Package Accept/Decline Award In Progress **Status Date:** 06/02/2005
Last Edited User: SYSTEM ACCOUNT

Action: **Submit**

Comment:

[View previous workflow history and comments >>](#)

Grant Information
CFDA Number: 11.433 **Award Period:** 07/01/2005 - 12/31/2005 **Program Office:** NORTH EAST
Program Officer: Charles Peterson **Program Officer Phone:** 301-713-0105 **Program Officer Email:** charles.peter
Total Federal Funding: \$100.00 **Total Non Federal Funding:** \$0.00
Organization Name: University of Chicago
Project Title: Testing for CCB folder changes

Sub Documents
 One item found.1

Type	ID	Title	Creator	Create Date	Last Action User	Status	Status Date
Amendment 0	104403	Testing for CCB folder changes	SYSTEM ACCOUNT	06/02/2005	SYSTEM ACCOUNT	AOActions In Progress	06/02/2005

Associated Documents
 One item found.1

Type	ID	Title	Creator	Create Date	Last Action User	Status	Status Date	Program Officer
Grants File	104398		SYSTEM ACCOUNT	06/02/2005	SYSTEM ACCOUNT	IN Progress	06/02/2005	

Additional Documents
 3 items found, displaying all items.1
[Document Name](#)
[Manage Award Recipient](#)
[Accept/Reject Award](#)
[Accounting Details](#)

Accepting an Award

11. Verify information (Please note, this information is test data)
12. Change information if needed (use the [Add/Change Recipient Administrator](#) link)
13. Click **Save**

The screenshot shows the NOAA Grants Online interface. The top navigation bar includes links for Inbox, RFA, Pre-Award, Award, Account Management, System Administration, Manage Certifications, Reports, and Help. A welcome message 'Welcome to Grants Online Bala Krishna' is displayed. On the left, a sidebar menu lists Advisories, Notifications, Archive, Tasks (highlighted), Send Message, and Manage Workflow Tasks. The main content area is titled 'Grant Information' and displays the following details:

CFDA Number:	11.433	Award Period:	07/01/2005 - 12/31/2005	Program Office:	
Program Officer:	Charles Peterson	Program Officer Phone:	301-713-0105	Program Officer Email:	
Total Federal Funding:	\$100.00	Total Non Federal Funding:	\$0.00		
Organization Name:	University of Chicago				
Project Title:	Testing for CCB folder changes				

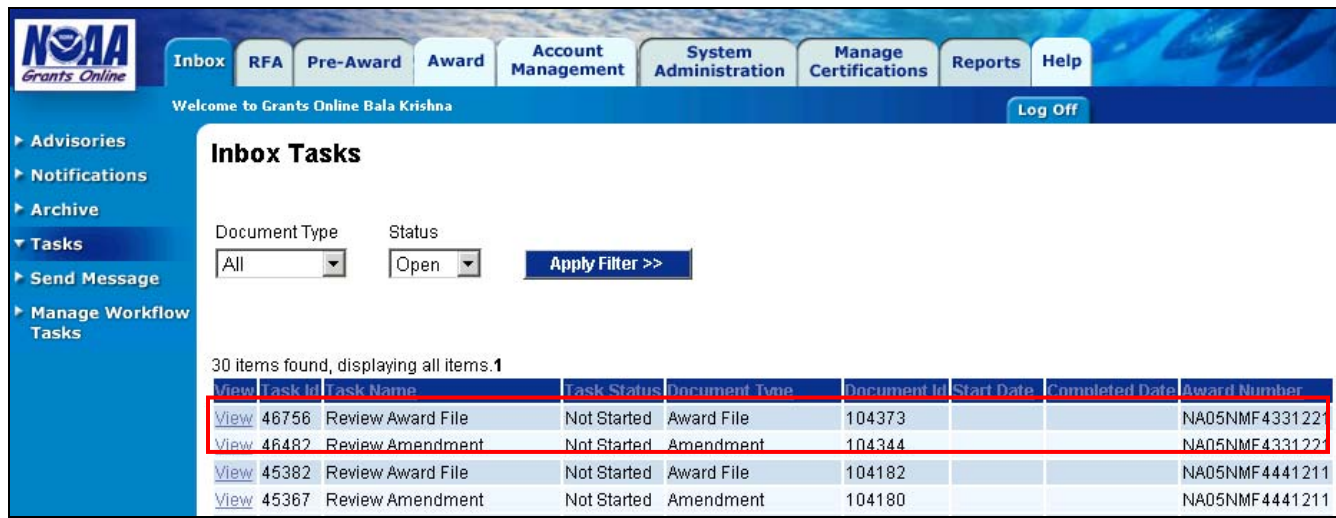
Below the grant information, the 'Accept Award' section shows the 'Organization' as 'University of Chicago'. The 'Recipient Administrator Information' section includes input fields for Name (Nick Gupta), Email (b@b.com), and Phone ((111)111-1111). A link for 'Add/Change Recipient Administrator' is provided. At the bottom, there are 'Save' and 'Cancel' buttons.

Reviewing an Award File/Amendment

This section will provide you with a step-by-step process on reviewing Award Files/Amendments in Grants Online.

Review Award File/Amendment

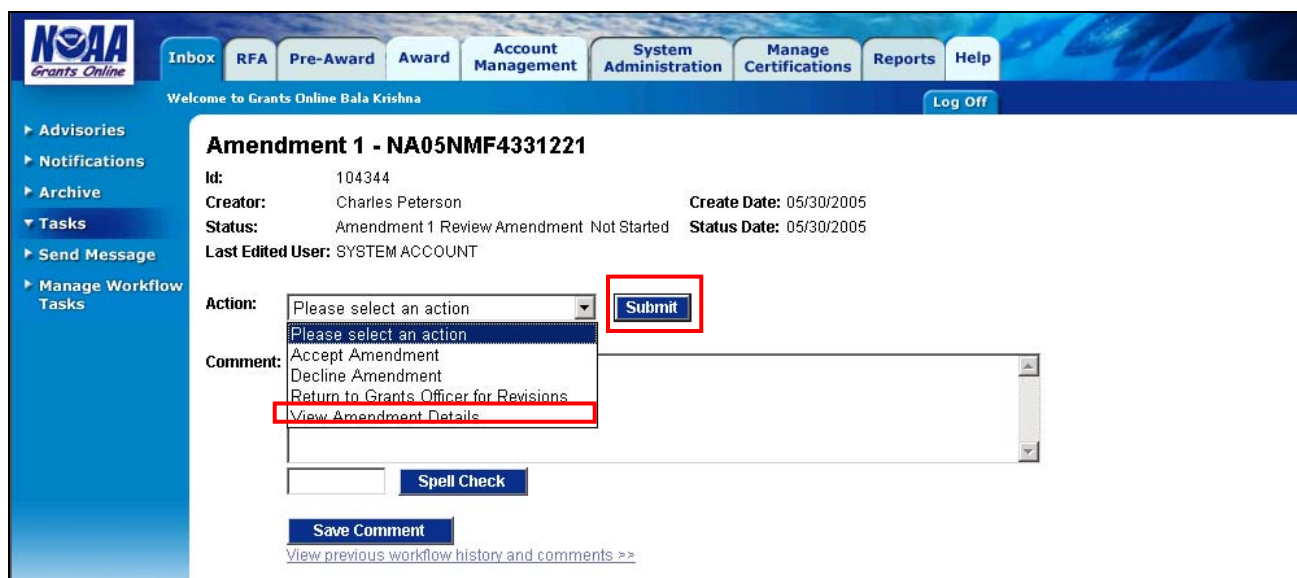
1. Click **View** next to the task you wish to work on (Review Award File or Review Amendment)



30 items found, displaying all items.1

View	Task ID	Task Name	Task Status	Document Type	Document ID	Start Date	Completed Date	Award Number
View	46756	Review Award File	Not Started	Award File	104373			NA05NMF4331221
View	46482	Review Amendment	Not Started	Amendment	104344			NA05NMF4331221
View	45382	Review Award File	Not Started	Award File	104182			NA05NMF4441211
View	45367	Review Amendment	Not Started	Amendment	104180			NA05NMF4441211

2. Select an action from the action dropdown
 - We recommend you select View Amendment/Award File Details first
3. Click **Submit**



Amendment 1 - NA05NMF4331221

Id: 104344
 Creator: Charles Peterson
 Status: Amendment 1 Review Amendment Not Started
 Last Edited User: SYSTEM ACCOUNT

Create Date: 05/30/2005
 Status Date: 05/30/2005


Action: Please select an action **Submit**

Comment: Accept Amendment
Decline Amendment
Return to Grants Officer for Revisions
View Amendment Details

Save Comment
[View previous workflow history and comments >>](#)

Review Award File/Amendment

4. View all information (including any reports)
5. Click **Cancel** to return to the task


Inbox RFA Pre-Award Award Account Management System Administration Manage Certifications Reports Help

Welcome to Grants Online Bala Krishna Log Off

▶ Advisories
 ▶ Notifications
 ▶ Archive
 ▼ **Tasks**
 ▶ Send Message
 ▶ Manage Workflow Tasks

Amendment Header Information

CFDA Number:	11.433	Award File Period:	05/20/2005 - 05/20/2006	Program Office:	SOUTH EAST REGION
Program Officer:	Charles Marcus Peterson	Program Officer Phone:	301-713-0105	Program Officer Email:	charles.peterson@noaa.gov
Federal Funding:	\$0.00	Non Federal Funding:	\$0.00	Grants Specialist:	Undefined
Project Title:	title title title title title title title title				
Organization Name:	University of Chicago				

Amendment to Financial Assistance Award

THIS DOCUMENT IS LOCKED

Project Title:
title title title title title title title title

CFDA Number:	11.433	Grant Type:	<input type="radio"/> Grant <input checked="" type="radio"/> Cooperative Agreement
Award Number:	NA05NMF4331221	Amendment Number:	1
Recipient Name:	Street Address: Main Street CHICAGO, IL 60601		
Amendment Start Date (Effective Date): *	<input type="text" value="05/20/2005"/>	Extend Work Completion To:	N/A
Currently, this field does not affect the Award start date			
Amendment End Date *	<input type="text" value="05/20/2006"/>		
Currently, this field does not affect the Award end date			

Bureau	Fund	Fiscal Year	Project-Task	Organization	Object Class																				
<p>The system has calculated values for the Federal and Recipient shares of funding based on approved CD-435s and negotiated funding amounts. Grants Officers can override these calculations via the Override checkbox below. Once checked, the values that are entered will be saved and available on the CD-451 report. Please note that once the Grants Officer signs, the system will automatically override and store the currently populated funding fields.</p> <p>Manual Override: <input type="checkbox"/></p> <table> <thead> <tr> <th>Costs Are Revised As Follows:</th> <th>Previous Estimated Cost</th> <th>Add</th> <th>Deduct</th> <th>Total Estimated Cost</th> </tr> </thead> <tbody> <tr> <td>Federal Share of Cost</td> <td><input type="text" value="\$100.00"/></td> <td><input type="text" value="\$0.00"/></td> <td><input type="text" value="\$0.00"/></td> <td><input type="text" value="\$100.00"/></td> </tr> <tr> <td>Recipient Share of Cost</td> <td><input type="text" value="\$10.00"/></td> <td><input type="text" value="\$0.00"/></td> <td><input type="text" value="\$0.00"/></td> <td><input type="text" value="\$10.00"/></td> </tr> <tr> <td>Total Estimated Cost</td> <td><input type="text" value="\$110.00"/></td> <td><input type="text" value="\$0.00"/></td> <td><input type="text" value="\$0.00"/></td> <td><input type="text" value="\$110.00"/></td> </tr> </tbody> </table> <p>Reasons(s) for Amendment: Enter Reasons</p> <p>This Amendment approved by the NOAA Grants Officer constitutes an obligation of Federal Funding. By electronically signing, the Recipient agrees to comply with the Amendment provisions checked on this document, as well as previous provisions incorporated into the Award. If not electronically signed without modification by the Recipient within 30 days of receipt, the Grants Officer may unilaterally terminate this Amendment.</p> <p><input checked="" type="checkbox"/> Special Award Conditions <input type="checkbox"/> Line Item Budget <input type="checkbox"/> Other(s)</p> <p>Signature of Department of Commerce Grants Officer: <input type="text" value="Arlene Porter"/> Date: <input type="text" value="05/30/2005"/></p> <div> CD451 Report SAC Report Cancel </div>						Costs Are Revised As Follows:	Previous Estimated Cost	Add	Deduct	Total Estimated Cost	Federal Share of Cost	<input type="text" value="\$100.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$100.00"/>	Recipient Share of Cost	<input type="text" value="\$10.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$10.00"/>	Total Estimated Cost	<input type="text" value="\$110.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$110.00"/>
Costs Are Revised As Follows:	Previous Estimated Cost	Add	Deduct	Total Estimated Cost																					
Federal Share of Cost	<input type="text" value="\$100.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$100.00"/>																					
Recipient Share of Cost	<input type="text" value="\$10.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$10.00"/>																					
Total Estimated Cost	<input type="text" value="\$110.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$110.00"/>																					

Review Award File/Amendment

6. Select an Action
7. Click **Submit**
8. Type and Save any comments you wish to be visible in the workflow history

NOAA Grants Online

Welcome to Grants Online Bala Krishna

Amendment 1 - NA05NMF4331221

Id: 104344
Creator: Charles Peterson
Status: Amendment 1 Review Amendment In Progress
Last Edited User: SYSTEM ACCOUNT
Create Date: 05/30/2005
Status Date: 05/30/2005

Action: **Submit**

Comment:

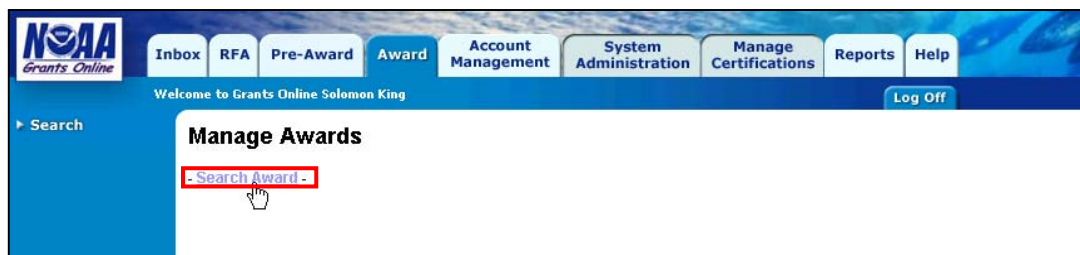
[View previous workflow history and comments >>](#)

Award Action Requests

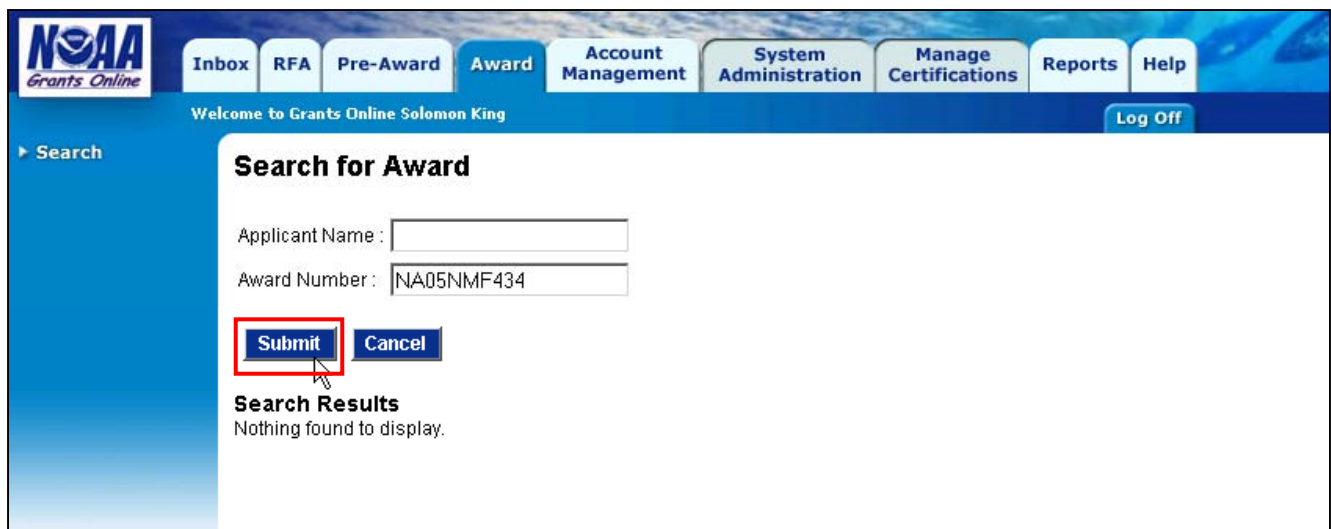
During the post award phase there are often times when the recipient needs to request an action on an award. This section goes through the steps needed to initiate an Award Action Request.

Processing an Award Action Request

1. Click on the Award Tab
2. Click **Search Award**

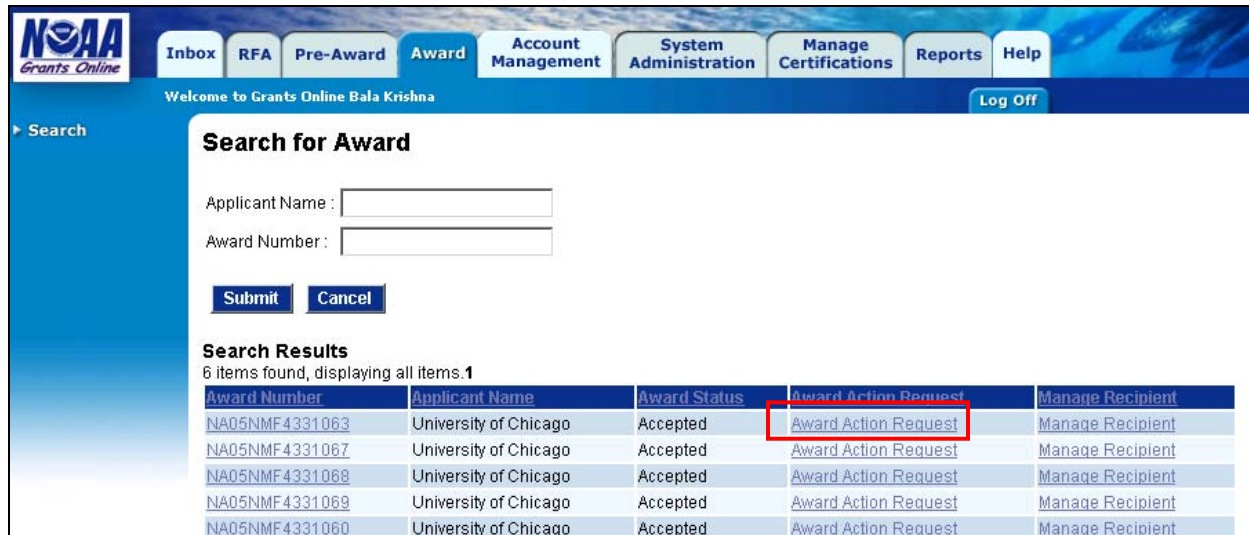


3. Search for Award screen displays
4. Enter the Award Number – you can search the award number by entering the entire number, or pieces of it
5. Click **Submit**
 - a. Click **Cancel** to go back to the previous page



Processing an Award Action Request

6. Search results are displayed
7. Click on the **Award Action Request** link to begin processing your action



The screenshot displays the NOAA Grants Online Bala Krishna web application. The top navigation bar includes links for Inbox, RFA, Pre-Award, Award, Account Management, System Administration, Manage Certifications, Reports, and Help. A 'Log Off' button is also present. The main content area is titled 'Search for Award' and contains input fields for 'Applicant Name' and 'Award Number', along with 'Submit' and 'Cancel' buttons. Below the search section, a 'Search Results' heading indicates '6 items found, displaying all items.1'. A table lists the search results, with the 'Award Action Request' link highlighted in the first row.

Award Number	Applicant Name	Award Status	Award Action Request	Manage Recipient
NA05NMF4331063	University of Chicago	Accepted	Award Action Request	Manage Recipient
NA05NMF4331067	University of Chicago	Accepted	Award Action Request	Manage Recipient
NA05NMF4331068	University of Chicago	Accepted	Award Action Request	Manage Recipient
NA05NMF4331069	University of Chicago	Accepted	Award Action Request	Manage Recipient
NA05NMF4331060	University of Chicago	Accepted	Award Action Request	Manage Recipient

Processing an Award Action Request

8. Click on the link of the Award Action Request you wish to initiate (they all have a similar process)
 - a. Clicking [Return to Main](#) will take you to the award package header screen. If you want to initiate an Award Action Request, you'll have to repeat steps 1-8 again.
9. For the purpose of the manual, we will select No Cost Extension – Without Invocation of Expanded Authority

The screenshot displays the Grants Online system interface. At the top, there is a navigation bar with tabs: Inbox, RFA, Pre-Award, Award, Account Management, System Administration, Manage Certifications, Reports, and Help. Below the navigation bar, a welcome message reads "Welcome to Grants Online Charles Peterson" with a "Log Off" button. The main content area is divided into two sections. The first section, "Grant Information", displays details for a grant: CFDA Number: 11.437, Award Period: 10/22/2005 - 09/30/2006, Program Office: SOUTH EAST REGIONAL OFFICE, Program Officer: Charles Peterson, Program Officer Phone: 301-713-0105, Program Officer Email: charles.peterson@noaa.gov, Total Federal Funding: \$326.00, Total Non Federal Funding: \$0.00, Organization Name: University of California, and Project Title: (blank). The second section, "Award Action Request Index", lists various request types. The first item, "No Cost Extension - Without Invocation of Expanded Authority", is highlighted with a red box. Other items include "No Cost Extension - Invocation of Expanded Authority", "Reprogram or Rebudget", "Equipment Purchase", "Foreign Travel", "Sole Source Contract", "Other", "Absence of more than 3 months or 25% by project director or PI", "Inclusion of cost that require prior approval based on cost principles", "Sub award, transfer or contracting out of any work under the award if not described in t", "Extension to Close Out", "Change in Scope", "Transfer of Award", "Change in Principle Investigator", "Change in Institution Name", "Change in Key Person Specified in the Application", "Satisfied Special Award Conditions", "Transfer of funds allotted for training to other categories of expenses", "Pre-Award Cost", and a "Return to Main" button at the bottom left.

Grant Information	
CFDA Number:	11.437
Award Period:	10/22/2005 - 09/30/2006
Program Office:	SOUTH EAST REGIONAL OFFICE
Program Officer:	Charles Peterson
Program Officer Phone:	301-713-0105
Program Officer Email:	charles.peterson@noaa.gov
Total Federal Funding:	\$326.00
Total Non Federal Funding:	\$0.00
Organization Name:	University of California
Project Title:	

Award Action Request Index	
No Cost Extension - Without Invocation of Expanded Authority	No Cost Extension - Invocation of Expanded Authority
Extension to Close Out	Reprogram or Rebudget
Change in Scope	Equipment Purchase
Transfer of Award	Foreign Travel
Change in Principle Investigator	Sole Source Contract
Change in Institution Name	Other
Change in Key Person Specified in the Application	Absence of more than 3 months or 25% by project director or PI
Satisfied Special Award Conditions	Inclusion of cost that require prior approval based on cost principles
Transfer of funds allotted for training to other categories of expenses	Sub award, transfer or contracting out of any work under the award if not described in t
Pre-Award Cost	

[Return to Main](#)

Processing an Award Action Request

10. Enter in the extension date
11. Provide a justification
12. Click **Save** to capture the changes
13. Click the Attach Files link to upload a budget of remaining funds
14. Once the file is attached, click **Save and Submit** to continue processing the request
 - a. Click **Cancel** to go back to the Award Action Request main page

Grant Information			
CFDA Number:	11.437	Award Period:	10/22/2005 - 09/30/2006
Program Officer:	Charles Peterson	Program Officer Phone:	301-713-0105
Total Federal Funding:	\$326.00	Total Non Federal Funding:	\$0.00
Organization Name:	University of California		
Project Title:			
Program Office:			
Program Officer Email:			

No Cost Extension - Without Invocation of Expanded Authority

No Cost Extension - Without Invocation of Expanded Authority

Extension Date Month Year Day

Justification*

Enter the recipient's justification as to why they deserve this extension, as well as why you as the Program Officer approve it

127 / 4000 [Spell Check](#)

[Attach Files](#) (For this request to be considered complete, you MUST attach a budget of remaining funds)

[Save](#) [Save and Submit](#) [Cancel](#)

Processing an Award Action Request

15. Navigate to your task inbox
16. You have a task to Review Award Action Request
17. Click **View** by that task

NOAA Grants Online

Welcome to Grants Online Bala Krishna

Inbox Tasks

Document Type: Status: [Apply Filter >>](#)

30 items found, displaying all items. 1

View	Task Id	Task Name	Task Status	Document Type	Document Id	Start Date	Completed Date	Award Number
View	51988	Review Award Action Request	Not Started	Award Action Request	104446			NA05NMF4331063
View	46756	Review Award File	Not Started	Award File	104373			NA05NMF4331221
View	45382	Review Award File	Not Started	Award File	104182			NA05NMF4441211

Processing an Award Action Request

18. Select the action in the action dropdown that best suits your need
 - a. **Forward to Agency – if you are ready to send to NOAA for approval**
 - b. Revise/Edit Award Action Request
 - c. Withdraw Award Action Request
19. Once you've selected an action, click **Submit**

NOAA Grants Online

Inbox RFA Pre-Award Award Account Management System Administration Manage Certifications Reports Help

Welcome to Grants Online Bala Krishna Log Off

Award Action Request - NA05NMF4331063

Id: 104446
Creator: SYSTEM ACCOUNT
Create Date: 06/10/2005
Status: Award Action Request Review Award Action Request Not Started
Status Date: 06/10/2005
Last Edited User: Bala Krishna

Action: Please select an action **Submit**

Comment: Forward To Agency
Revise/Edit Award Action Request
Withdraw Award Action Request

Spell Check

Save Comment

[View previous workflow history and comments >>](#)

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